


Portfolio

Wisconsin Cooperative Education Skill Certification Retail Marketing

Coop Areas Completed		Student Information	
Economic Foundations	20	Student	Phone
Communications and Interpersonal Foundations	31		
Professional Development	10	School	Phone
Marketing, Management and Entrepreneurial Foundations	28		
Building Sales	16	Teacher Coordinator	Phone
Customer Service and Sales	17		
Inventory and Product Handling	18	Workplace Mentor	Phone
Loss and Safety Procedures	10		
Creating a Competitive Advantage	9		
<div> <div>Start Date</div> <div>End Date</div> </div>		<div>Other Information:</div> <div>  </div>	

Retail Marketing Skill Standards Rating Scale

- 3 Proficient—able to perform entry-level skills independently.
 2 Intermediate—has performed task; may need additional training or supervision.
 1 Introductory—is familiar with process but is unable, or has not had the opportunity, to perform task; additional training is required.
SB School Based
WB Work Based

Description of Skills	Rating			Initials		Comments
	3	2	1	SB	WB	

Economic Foundations

18 competencies must be achieved at level 2 or 3

1. Distinguish between economic goods and services						
2. Explain the concept of economic resources						
3. Describe the nature of economics and economic activities						
4. Determine forms of economic utility created by economic activities						
5. Describe the principles of supply and demand						
6. Describe the concept of price						
7. Explain how price is impacted by the interaction of supply and demand						
8. Explain the types of economic systems						
9. Explain the relationship between government and business						
10. Explain the concept of private enterprise						
11. Determine factors affecting a business's profit						
12. Explain the concept of competition						
13. Explain the concept of productivity						
14. Explain the concept of organized labor and business						
15. Explain the measures used to analyze economic conditions such as Consumer Price Index and Gross Domestic Product						
16. Analyze current economic problems						
17. Examine the nature of international trade						
18. Identify the impact of cultural and social environments on world trade						
19. Evaluate the influences on a nation's ability to trade						
20. Analyze a country's cultural, political, economic and demographic environments						

Communications and Interpersonal Foundations

28 competencies must be achieved at level 2 or 3

1. Explain the nature of effective communications (verbal, written)						
2. Apply effective listening skills						
3. Use proper grammar and vocabulary						
4. Handle telephone calls in a businesslike manner						
5. Write business letters, informational messages and inquiries						
6. Use communications technologies/systems (e.g., e-mail, faxes, voice mail, cell phones, etc.)						
7. Convince others of a point of view						
8. Make oral presentations						
9. Prepare simple written reports						
10. Explain the use of inter-departmental/company communications						
11. Demonstrate basic word processing skills						

Description of Skills	Rating			Initials		Comments
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12. Demonstrate basic word presentation software skills						
13. Demonstrate basic database skills						
14. Demonstrate basic spreadsheet skills						
15. Demonstrate basic search skills on the web						
16. Identify desirable personality traits important to business						
17. Maintain positive attitude						
18. Demonstrate responsible behavior, honesty and integrity						
19. Recognize personal biases and stereotypes						
20. Demonstrate work ethics						
21. Demonstrate self-control						
22. Explain the concept of self-understanding and self-esteem						
23. Use feedback for personal growth						
24. Adjust to change						
25. Make decisions						
26. Set personal and professional goals						
27. Develop cultural sensitivity						
28. Participate as a team member						
29. Explain the concept of customer service						
30. Demonstrate problem-solving skills						
31. Interpret business policies to customers/clients						

Professional Development

9 competencies must be achieved at level 2 or 3

1. Assess personal interests and skills needed for success in marketing and business						
2. Analyze employer expectations in the business environment						
3. Explain the rights of workers						
4. Explain employment opportunities in marketing and business						
5. Utilize job search strategies						
6. Complete the job-seeking process						
7. Explain the need for ongoing education as a worker						
8. Explain possible advancement patterns for jobs						
9. Develop an individual professional portfolio						
10. Utilize resources that can contribute to professional development (e.g., trade journals/periodicals, professional/trade associations, classes/seminars, trade shows)						

Marketing, Management and Entrepreneurial Foundations

25 competencies must be achieved at level 2 or 3

1. Explain marketing and business and its importance in a global economy						
2. Describe marketing functions and related activities						
3. Explain the nature and scope of purchasing						
4. Explain company buying and purchasing policies						
5. Explain the concept of production						
6. Explain the concept of accounting						

Description of Skills	Rating			Initials		Comments
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7. Calculate net sales						
8. Describe the nature of cash-flow statements						
9. Prepare a profit and loss statement						
10. Explain the concept of finance						
11. Explain the concept of management						
12. Contrast management styles and practices						
13. Describe the nature of budgets						
14. Describe the crucial elements of TQM culture						
15. Explain the nature of continuing improvement strategies						
16. Explain the types of business ownership						
17. Describe current business trends						
18. Identify the ways that technology affects marketing and business						
19. Explain basic types of business risk						
20. Describe the concept of insurance						
21. Explain routine security precautions						
22. Open and close a business facility						
23. Follow safety precautions						
24. Explain procedures of handling accidents						
25. Explain the nature of legally binding contracts						
26. Orient new employees						
27. Explain the nature of overhead and operating costs						
28. Describe planning tools used by management (budgets, forecasts, financial statements, schedules) to control operations						

Building Sales

14 competencies must be achieved at level 2 or 3

1. Determine customer's needs by listening and asking questions						
2. Make the shopping experience enjoyable for the customer						
3. Give customer appropriate greeting						
4. Direct customer to additional services such as delivery, alterations, gift wrapping						
5. Refer customer to another department/store						
6. Follow through on commitments made to customers						
7. Respond to personal needs of customers						
8. Honor manufacturer's warranties						
9. Adhere to company's return policy						
10. Handle customer complaints						
11. Balance responsive phone service with in-store service						
12. Maintain key information on customers						
13. Conduct customer follow-up						
14. Provide customer with personalized business card						
15. Complete special orders						
16. Schedule personal appointment with shopper, select merchandise in advance						

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Customer Service and Sales

15 competencies must be achieved at level 2 or 3

1. Listen and ask open-ended questions						
2. Acquire and apply product knowledge						
3. Request product feedback from customer						
4. Handle customer objections						
5. Verify product is appropriate for customer use						
6. Offer alternative sales options						
7. Motivate customer to return for future purchases						
8. Sell customer additional or related items						
9. Review current advertising and promotions						
10. Convert phone calls into sales						
11. Encourage customer to open credit accounts and purchase gift certificates						
12. Assist customer in making purchase decision						
13. Handle transactions and related paperwork						
14. Inform customer of return/exchange policy						
15. Open, maintain and close cash register						
16. Package merchandise properly						
17. Assure that shipping/mailings/deliveries are handled properly						

Inventory and Product Handling

16 competencies must be achieved at level 2 or 3

1. Check-in merchandise against paperwork						
2. Assure accurate pricing on merchandise						
3. Review stock and re-stock as appropriate						
4. Participate in periodic inventory process						
5. Prepare returned merchandise for resale						
6. Return inventory to a manufacturer/vendor						
7. Initiate or respond to requests for merchandise transfer						
8. Identify damaged goods and handle appropriately						
9. Initiate repair order						
10. Complete special orders						
11. Organize and maintain supplies						
12. Organize stockroom and storage areas						
13. Clean selling and customer services areas						
14. Report need for repair and replacement						
15. Arrange merchandise						
16. Relay feedback from customers on the effectiveness of displays						
17. Maintain displays following company's display guidelines						
18. Dismantle displays						

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Loss and Safety Procedures

9 competencies must be achieved at level 2 or 3

1. Alert customers to your presence/availability						
2. Attach and remove security devices						
3. Account for items after customer use of dressing room						
4. Report stock shrinkage						
5. Report security violations						
6. Monitor floor merchandise						
7. Alert sales associates to suspicious customers						
8. Report safety problems in the department/store						
9. Follow emergency procedures						
10. Maintain accurate records						

Creating a Competitive Advantage

8 competencies must be achieved at level 2 or 3

1. Share ideas and information about selling, marketing, products, customers, feedback and loss control						
2. Attend store meetings and major events						
3. Assist/turnover sale to co-worker to better serve customer and company						
4. Assist with training and orientation of new employees						
5. Work out schedule conflicts with co-workers						
6. Research the competition (products, prices and services)						
7. Provide manager and peers with feedback on competition						
8. Track sales versus established standards						
9. Develop personal and professional goals						

The Competencies in This Portfolio Have Been Endorsed By:



Wisconsin and National DECA



Wisconsin Association for
Leadership in
Education and Work



Wisconsin
Manufacturers
and Commerce



Wisconsin Association for
Career and Technical
Education



Wisconsin Marketing
Education Association



Wisconsin
Technical College
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***Milwaukee Sales
and Marketing
Executives***

***Sales and Marketing
Executives
of Wisconsin***



Wisconsin
Department of Public
Instruction